Determining labour shortages and the need for labour migration from third countries in the EU

Common Template of EMN Focussed Study 2015

Final Version

Subject: Common Template for the EMN Focussed Study 2015 on “Determining labour shortages and the need for labour migration from third countries in the EU”

Action: EMN NCPs are invited to submit their completed Common Templates by 11th May 2015. If needed, further clarifications can be provided by directly contacting the EMN Service Provider (ICF International) at emn@ghkint.com

1 STUDY AIDS AND RATIONALE

As identified in a recent study commissioned by the European Commission (DG Employment, Social Affairs and Inclusion), there are several important challenges affecting Europe’s future labour market, including an ageing society requiring more effective use of the labour force; rapid technological changes and development; increasing demand for highly skilled labour; and uncertainty about future growth in European economies. In this respect, it is essential to identify and address labour market shortages, which could affect growth through their adverse effects on labour productivity.

While to a certain extent, skills mismatches will always exist as a part of the frictional dynamics of the labour market (i.e. cyclical labour shortages), persistent or structural shortages can be detrimental to economic recovery and growth. Some structural changes, such as the adoption of new technologies, may increase the demand for certain skills that are not immediately available in the labour market, creating skills shortages even when unemployment is high. In this respect, one of the main challenges faced by policy makers is identifying real, structural labour shortages, which cannot be met by the local labour force even if the labour market is functioning well or measures are taken to improve it, e.g. by supporting labour matching or by increasing the attractiveness of the work in light of scarce labour supply.

While migration is not necessarily a panacea for the economic problems in Europe, it is seen as part of the response to labour market policies and identified shortages. Labour and skills shortages are frequently cited by policymakers and employers as amongst the main reasons for attracting foreign labour. The ability to attract skills and talents and to recruit from abroad when necessary can help foster growth and innovation.

1 “Mapping and analysing the bottleneck vacancies in EU labour markets” (September 2014) commissioned by the European Commission, Available at: ec.europa.eu/social/BlobServlet?docId=12625&langId=en
Access to information and analysis on the functioning of the labour market is crucial in order to develop relevant policy measures. Examining and assessing the extent of labour shortages is key to developing a credible labour migration policy. Mechanisms used for identifying current and future skills shortages and for anticipating the need for migrant labour can include lists of shortage occupations, employers’ needs analysis, labour market needs analysis, survey, forecasts and foresights, qualitative studies, etc.

The aim of this focussed study is to provide an overview of the mechanisms in place in (Member) States to determine labour shortages and to quantify the needs for labour migration. The study will also assess how the impact of labour migration on national labour markets is monitored and what kind of instruments are used to that end.

The study includes in its scope all skill and qualification levels of third-country nationals and is not limited to highly skilled or skilled third-country nationals.

More specifically, the study aims to:

- Provide an overview of national labour migration policy and recent public and policy debates on labour migration;
- Analyse whether there is a link between identified labour shortages and labour migration policy;
- Provide an overview of mechanisms for identifying labour and skills shortages and for anticipating the need for migrant labour, and;
- Examine how are the lists of shortage occupations defined and classified as well as whether Member States make any distinctions between different types of shortages (e.g. current vs. longer-term shortages; temporary vs. permanent shortages);
- Explore the role of social partners and other stakeholders and whether there are any formal mechanisms to consult/involve social partners in determining labour shortages and the anticipated need for migrant labour;
- Compare across (Member) States how the impact of labour migration on shortage occupations is monitored;
- Where available, provide statistical overview on the number of workers employed by selected occupations and estimated unfilled vacancies of the top shortage occupations and occupations included in the shortage lists.

2 TARGET AUDIENCES

The study would benefit primarily national and EU policy makers and officials concerned with labour migration, economic policy and labour market analysis. The study would also be of interest to other stakeholders, including social partners, in the labour markets of the Member States and at the EU level. Finally, it could serve academia and researchers in the above-mentioned fields.

3 EU LEGAL AND POLICY CONTEXT

At EU level, the study should be seen in the context of the overarching Europe 2020 Strategy for economic growth and in particular, within one of its five objectives focusing on high employment levels as well as creation of new skills and jobs.

In March 2014, in view of the discussions on the post-Stockholm Programme (which covers the period from 2010 to 2014), the European Commission adopted a Communication “An open and secure Europe: making it happen which identified the central issues to be tackled over the next years”². The Communication underlines that demographic changes in Europe, coupled with significant skill shortages in certain sectors (notably engineering, IT and health care) hinder the EU's productivity and respectively its economic recovery. At the same time, increasing global competition for skills and talents affects labour markets in many Member States.

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and will be a decisive factor for Europe's economic prosperity in the decade ahead. The Communication further highlighted that in recent years, the European Union has followed a sector-by-sector approach to legal migration, which has resulted in a common legal framework, which regulates the admission of certain categories of third-country nationals.

To this effect, a number of policy and legislative measures have been introduced aim to produce flexible admission systems, responsive to the priorities of each EU State, while enabling migrant workers to make full use of their skills. These measures cover the conditions of entry and residence for certain categories of immigrants such as highly qualified workers (“EU Blue Card” Directive 2009/50/EC), seasonal workers (Directive 2014/36/EU) and intra-corporate transferees (Directive 2014/66/EU), as well as the establishment of a single work and residence permit (Directive 2011/98/EU).

With regard to **other initiatives at EU level**, as reported in the European Commission’s 5th Annual Report on Immigration and Asylum (2013), the Commission joined forces with the Organisation for Economic Cooperation and Development (OECD) in two consecutive projects focused on economic migration and labour market needs. The first project on "Matching Economic Migration with Labour Market Needs" aimed to identify policies and practices required to ensure that migration can effectively respond to labour market needs over the short-to-medium term (2020 horizon). It produced a series of studies aimed at analysing the challenges related to an efficient matching of immigrant skills to labour market needs, as well as policy recommendations. The second project, which will run in 2014 and 2015, aims to assess to which extent the EU, as a destination region for labour migrants from outside the Union, can compete on the global labour market for skills, and to which extent EU policy instruments have helped to foster EU attractiveness. On 11 December 2013, the Commission published a call for proposals containing a research topic on "The European growth agenda (EURO-2-2014)", with a specific research dimension on Migration, prosperity and growth.

**4 LIST OF RELEVANT SOURCES AND LITERATURE**

**EMN Studies, Informs and Ad-Hoc Queries**

- Ad-Hoc Query No. 554: Campaigns to attract third country nationals requested by EE NCP on 10th April 2014
- "The application of quotas in EU Member States as a measure for managing labour migration from third countries", EMN Inform, published 2014
- "Approaches and tools used by Member States to identify labour market needs", EMN Inform, published December 2013
- "Attracting highly qualified and qualified third-country nationals", EMN focussed study, published 2013
- Ad-Hoc Query No.508: Regulatory inflow to control inflow of foreign workers launched by LT NCP on 27th September 2013
- Ad-Hoc Query No.388: Establishing a complex monitoring system of the factual employment of third-country nationals in EU Member States launched by PL NCP on 14th March 2012
- "Satisfying Labour Demand through Migration", EMN main study, published June 2011
- "Temporary and circular migration: empirical evidence, current policy practices and future options in the EU", EMN study, published October 2011
- "Conditions of entry and residence of third country highly skilled workers", EMN study, published 2007

**Other EU and international studies and reports**


"Mapping and analysing the bottleneck vacancies in EU labour markets” (September 2014) commissioned by the European Commission, Available at: ec.europa.eu/social/BlobServlet?docId=12625&langId=en


5 AVAILABLE STATISTICS

EU level
★★ European Union Labour Force Survey (EU LFS)
Labour market statistics are available through the European Union Labour Force Survey (EU LFS).

There are limited indicators of labour market statistics that are disaggregated by nationality or national groups, including:

- Employment by sex, age and nationality (lfsa_ergan) (annual statistics)
- Inactive population by sex, age and nationality (lfsa_argan) (annual statistics)
- Self-employment by sex, age and nationality (lfsa_esgan) (annual statistics)
- Population by sex, age, nationality and labour status (lfsa_pganws) (annual statistics)

In addition, there are a number of labour market indicators which cannot be disaggregated by nationality, including:

- Job vacancy statistics by occupation and NUTS 2 regions (jvs_a_nace2) (annual statistics)
- Participants in labour market policy (LMP) interventions (imp_particip)(annual statistics)
- Public expenditure on labour market policy (LMP) interventions (imp_expend) (annual statistics)

★★ Eurostat migration statistics is another statistical source in terms of the following indicators:

- Residence permits by reason, length of validity and citizenship (migr_resval) (annual statistics)
- First permits issued for remunerated activities by reason, length of validity and citizenship (migr_resocc)
- EU Blue Cards by type of decision, occupation and citizenship (migr_resbc1)
- EU Blue Cards holders and family members by Member State of previous residence (migr_resbc3)

★★ European Centre for the Development of Vocational Training (CEDEFOP) undertakes a number of activities for identifying skills needs3. Forecasting skill demand and supply database4 - Cedefop produces regular skill supply and demand forecasts for Europe and analyses the potential labour market imbalances. The forecasts are for the period 2015-2025 and include forecasting data on the labour force, employment trends and job

3 Available at: http://www.cedefop.europa.eu/en/themes/identifying-skills-needs
opportunities. It is based on Eurostat population projections Europop 2010 as and macroeconomic forecasts developed by DG ECFIN.

National level

At national level, statistics on shortage occupations and estimated unfilled vacancies are likely to be available from Ministries of labour, Employment agencies, National statistical offices and authorities and other competent authorities. The present study aims to collect statistics for the period 2012-2014 on top 15 unfilled vacancies and shortage occupations. (Please see the Statistical Annex tables)

6 DEFINITIONS

‘Circular migration’ is a repetition of legal migration by the same person between two or more countries. (Source: EMN Glossary V3)

‘Contract migrant worker’ refers to a person working in a country other than their own under contractual arrangements that set limits on the period of employment and on the specific job held by the migrant. (Source: EMN Glossary V3)

‘Economic migration’ refers to migration mainly for economic reasons or in order to seek material improvements to livelihood. (Source: EMN Glossary V3)

‘Employee’ is defined as a worker holding an explicit or implicit employment contract, which gives them a basic remuneration that is not directly dependent upon the revenue of the unit for which they work. (Source: EMN Glossary V3)

‘Employer’ is considered any natural person or any legal entity, including temporary work agencies, for or under the direction and/or supervision of whom the employment is undertaken. (Source: EMN Glossary V3)

‘Employment’ is defined as the exercise of activities covering whatever form of labour or work regulated under national law or in accordance with established practice for or under the direction and/or supervision of an employer. (Source: EMN Glossary V3)

‘Immigration quota’ is defined as a quota established for and by the country, normally for the purposes of labour migration, for the entry of immigrants. (Source: EMN Glossary V3)

‘Intra-corporate transferee’ refers to a third-country national subject to a temporary secondment from an undertaking established outside the territory of a Member State and to which the third-country national is bound by a work contract to an entity belonging to the undertaking or to the same group of undertakings which is established inside this territory. (Source: EMN Glossary V3)

‘Intra-EU mobility’ is an action of persons (EU nationals or legally resident third-country nationals) undertaking their right to movement by moving from one EU Member State to another. (Source: EMN Glossary V3)

‘Labour market test’ a mechanism that aims to ensure that migrant workers are only admitted after employers have unsuccessfully searched for national workers, EU citizens (in EU Member States this also means EEA workers) or legally residing third-country nationals with access to the labour market according to national legislation. (Source: EMN Glossary V3)

‘Labour migration’ is a movement of persons from one state to another, or within their own country of residence, for the purpose of employment. (Source: EMN Glossary V3)
'Labour shortage' is a shortage or insufficiency of qualified candidates for employment (in an economy, country) (Collins Dictionary)

'Mobility partnership' refers to cooperation arrangement, on the basis of political declarations, that provides the bilateral framework for dialogue and practical cooperation to address relevant migration and mobility issues of mutual concern primarily with EU neighbourhood countries, including short and long-term mobility, on a voluntary basis. (Source: EMN Glossary V3)

'Occupation' is defined as a set of jobs whose main tasks and duties are characterised by a high degree of similarity. (Source: EMN Glossary V3)

'Social partners' refers to employers' associations and trade unions forming the two sides of social dialogue (Source: European Quality Assurance in Vocational Education and Training (EQAVET); European Commission Glossary5)

'Seasonal worker' is a third-country national who retains their principal place of residence in a third country and stays legally and temporarily in the territory of a Member State to carry out an activity dependent on the passing of the seasons, under one or more fixed-term work contracts concluded directly between that third-country national and the employer established in that Member State. (Source: EMN Glossary V3)

'Skills shortages' refers to shortages of particular skills on the labour market. Skills shortages can be cyclical and structural. On the one hand, shortages are common during periods of rapid economic growth, when unemployment is low and the pool of available workers is reduced to a minimum. However, these type of shortages tend to be overcome along the cycle. On the other hand, some structural changes, such as the adoption of new technologies, may increase the demand for certain skills that are not immediately available in the labour market, creating skills shortages even when unemployment is high. In fact, having a large pool of unemployed people provides no guarantee that employers can find appropriately skilled individuals to fill their vacancies. (Source: OECD)

'Social dumping' refers to the practice whereby workers are given pay and/or working and living conditions which are sub-standard compared to those specified by law or collective agreements in the relevant labour market, or otherwise prevalent there. (Source: EMN Glossary V3)

7 ADVISORY GROUP

For the purpose of providing support to EMN NCPs while undertaking this focussed study and for developing the Synthesis Report, an "Advisory Group" has been established. The members of the Advisory Group for this study, in addition to COM and EMN Service Provider (ICF International), are HU, IE, LT, NL, SE and UK EMN NCPs. EMN NCPs are thus invited to send any requests for clarification or further information on the study to the following “Advisory Group” members:

★ COM: Jan.Saver@ec.europa.eu and Magnus.OVILIUS@ec.europa.eu
★ EMN Service Provider (ICF International): emn@ghkint.com
★ HU EMN NCP: agnes.tottos@bm.gov.hu
★ IE EMN NCP: EMN.Ireland@esri.ie; alan.barrett@esri.ie; egle.guscipote@esri.ie; emma.quinn@esri.ie
★ LT EMN NCP: emn@iom.lt

5 Available at: http://www.eqavet.eu/qa/qns/glossary/s/social-partners.aspx
8 PROVISIONAL TIMETABLE

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<tr>
<td>w/c 1st December 2014</td>
<td>Advisory Group to review draft</td>
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<td>Draft Common Template V1 to be discussed during 70th EMN NCP meeting</td>
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<tr>
<td>21st January 2015</td>
<td>Advisory Group Meeting to discuss draft study specifications</td>
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<tr>
<td>w/c 23rd February 2015</td>
<td>Finalisation of the Common Template and official launch of the study</td>
</tr>
<tr>
<td>w/c 11th May 2015</td>
<td>Completion of the National Reports by EMN NCPs</td>
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<td>w/c 1st June 2015</td>
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9 TEMPLATE FOR NATIONAL CONTRIBUTIONS

The template outlines the information that should be included in the National Contributions to this focussed study. The indicative number of pages to be covered by each section is provided in the guidance note. For national contributions, the total number of pages should not exceed 28 pages, including the questions and excluding the statistical annex. A limit of 25 pages will apply to the Synthesis Report, in order to ensure that it remains concise and accessible.

\(^6\) Provided that a sufficient number of EMN NCPs submit their National Contribution in time for the Synthesis stage.
EMN FOCUSED STUDY 2015

Determining labour shortages and the need for labour migration from third countries in the EU

Top-line “Factsheet” (National Contribution)

National contribution (one page only)

Overview of the National Contribution – introducing the study and drawing out key facts and figures from across all sections of the Focussed Study, with a particular emphasis on elements that will be of relevance to (national) policymakers.

This focussed study addresses the question of labour market shortages and immigration policy. In this respect, migration is seen as part of the response to labour market policies and identified shortages. Labour and skills shortages are frequently cited by policymakers and employers as amongst the main reasons for attracting foreign labour. The ability to attract skills and talents and to recruit from abroad when necessary can help foster growth and innovation. Examining and assessing the extent of labour shortages is key to developing a credible labour migration policy. Mechanisms used for identifying current and future skills shortages and for anticipating the need for migrant labour can include lists of shortage occupations, employers’ needs analysis, labour market needs analysis, survey, forecasts and foresights, qualitative studies, etc.

This focussed study aims to provide an overview of these mechanisms in place in Italy to determine labour shortages and to quantify the needs for labour migration.

More specifically, the study wants to:

- Provide an overview of Italian labour migration policy and recent public and policy debates on labour migration;
- Analyse the link between identified labour shortages and labour migration policy;
- Provide an overview of mechanisms for identifying labour shortages and for anticipating the need for migrant labour;
- Explore the role of social partners and other stakeholders in determining labour shortages and the anticipated need for migrant labour.

The study would benefit primarily national and EU policy makers and officials concerned with labour migration, economic policy and labour market analysis. The study would also be of interest to other stakeholders, including social partners, in the labour markets of the Member States and at the EU level. Finally, it could serve academia and researchers in the above-mentioned fields.
Executive Summary (Synthesis Report)

Synthesis Report (up to three pages)

Executive Summary of Synthesis Report: this will form the basis of an EMN Inform, which will have EU and National policymakers as its main target audience.

Section 1: General overview of the national labour migration policy and recent public and policy debates on labour migration

This section aims to outline the national migration policy and recent public policy debates on migration. Firstly, it examines whether the conditions for entry and stay for third-country nationals provided in national legislation are directly linked to shortage occupations. It further explores the policy instruments in place used for managing economic migration (for example quotas, labour market tests, points-based systems, other instruments). Secondly, the section focuses on recent public debated on labour migration especially with regard to debates on how labour migration is planned to be utilised to address labour market shortages. Thirdly, the section looks at the extent to which Member State view immigration as a tool to address labour shortages and the overall role envisaged by policy for migration to address labour shortages.

Q1. Please briefly describe how the national labour migration policy functions in your (Member) State. (Maximum 1 page)

Q1 (a). Are conditions for entry and stay for (categories of) third-country nationals provided in national legislation linked to shortage occupations?

Q1 (b). What are the instruments in place in your Member State for managing economic migration (quotas, labour market tests, points-based systems, other instruments) and how are they linked to labour shortages identified (for example, labour market test is not applied for third-country nationals applying for jobs listed in lists of shortage occupations)

Q1. (c) To what extent does you Member State view immigration as a tool to address labour shortages? What overall role for migration to address labour shortages is envisaged by policy in your Member State?

Entry in Italy for work reasons is regulated by the Consolidated Act on Immigration, Legislative Decree 286/1998 and following amendments (hereinafter Immigration Law). In particular, Article 21(1) lays down that "entry into the territory of the State for work reasons, including seasonal and self-employment, is subject to entry quotas, as established in the decrees referred to in Article 3(4)". In particular, Article 3(4) establishes that "the maximum quotas of foreigners to admit in the territory of the State for work reasons (including seasonal employment and self-employment) shall be set on a yearly basis by 30 November in the year prior to the decree reference year by decree of the President of the Council of Ministers, after hearing the Committee referred to in Article 2bis(2), the Unified Conference (referred to in Article 8 of Legislative Decree 28 August 1997, No 281) and the competent parliamentary committees. Such determination shall be made on the basis of the general criteria identified in a policy document, taking into account family reunification and the temporary protection measures that may have been taken under Article 20. If necessary, additional decrees may be issued during the year. Entry visas and residence permits for work reasons, including seasonal employment and self-employment, shall be issued within the limits of such quotas. If a yearly quota decree fails to be published, by 30 November the President of the Council of Ministers may set such immigration quotas on a transitional basis, within the quota thresholds established in the last decree". The immigration quotas provided for in the Decreto Flussi (hereinafter Quota Decree) are broken down by employment (including seasonal employment) and self-employment, and are intended for the entry of third-country nationals who are outside Italian territory. Moreover, the Quota Decree may reserve some of the quotas for foreign nationals who live in the States that conclude agreements on entry and readmission procedures, countering illegal immigration.

The need to tie the residence for work reasons of third-country nationals to the actual demand for foreign
labour has always been a main objective in Italian immigration legislation. Law 28 February 1990 No 39 setting out rules on political asylum, entry and stay of foreign nationals and stateless persons present on the territory of the State already provided for a definition of yearly migrant quotas (Article 2).

For this purpose, the Immigration Law, Article 21(4; 4.bis and 4.ter), establishes that the determination of immigration quotas in yearly decrees must take into account the information provided by the Ministry of Labour about national and regional employment and unemployment trends as well as about the integration of third-country nationals into the labour market. In addition, immigration quotas should be set in accordance with data on labour demand, broken down by regions and provinces, as processed by the automated register that has been set up at the Ministry of Labour. Moreover, by 30 November of each year, each Region may send a report to the Presidency of the Council of Minister on the presence and condition of third-country immigrants in its regional territory. This report may include estimates on sustainable levels of migrants in relation with the ‘absorption capacity’ of the local labour market and the social fabric. Finally, immigration quotas are to be distributed across national territory according to actual labour demand, taking into account these regional reports.

Under Article 22 of the Immigration Law, responsibilities for the recruitment of foreign labour lie with the Single Desk for Immigration. The single Desk for Immigration has an office at the Prefecture - Territorial Government Office - in each Italian Province. A Single Desk for Immigration consists of a Questura (Provincial Police Headquarters), which has to issue an opinion on the worker’s subjective requirements - and of a Direzione Territoriale del Lavoro (Territorial Employment Department), which has to check contractual requirements for recruitment.

According to the purview of Article 22, an Italian or legally residing foreign employer who wishes to establish a temporary or open-ended employment relationship with a third-country national residing abroad must apply at the Single Desk for Immigration of the province of his/her residence or of the registered office of his/her business. The following documents must be submitted: (a) an application for work authorization with the name of the worker; (b) an indication of suitable accommodation intended as a residence for the foreign worker; (c) a proposed residence contract, specifying contractual conditions and including the employer’s commitment to pay for the cost of return to the worker’s country of origin in the event deportation; and (d) a commitment to communicate any change in the employment relationship. However, under Article 22(2), before submitting an application for recruitment of a third-country national, an employer should check with the local employment agency that there is no worker available on national territory.

Within 60 days from the submission of the application at the latest, provided that the provisions specified in 22(2) and in the applicable collective agreement are met, after hearing the opinion of the Questore (provincial chief of police), the Single Desk for Immigration issues an authorization, within the quantitative and qualitative limits set in Articles 3(4) and 21. On the request of the employer, the Single Desk for Immigration forwards the relevant documents, including the fiscal code, to the consular offices, electronically. A work authorization has a validity of up to 6 months from the date of issue.

Applications for work authorization must be sent electronically to the Ministry of the Interior. An applicant has to register on the Ministry’s website, download a specific software, import, fill and then send his/her application in the time-window established by the relevant decree.

Article 23 grants a priority right to foreign nationals who reside abroad, request to work in Italy and have completed approved training and educational programmes in their countries of origin. A list of the training activities and programmes approved by the Ministry of Labour and Social Policies is available on the Ministry website. Under Article 23(2), the activities of the so-called special projects that may confer priority rights should aim at: (a) work placement in the Italian production sectors that operate within the State; (b) work placement in the Italian production sectors that operate within the countries of origin; and (c) the development of production or independent entrepreneurial activities in the countries of origin.
A foreign worker who has been granted a work authorization can apply for a visa for work reasons at the Italian consular posts or diplomatic missions of his/her country of residence. Within 8 days from entry in Italy, a third-country national must go to the Prefecture to complete this procedure by signing a document called ‘residence contract’ and to apply for a residence permit. The main terms of the employment contract, the particulars of the parties and the employer’s commitments are specified in this contract. The employer undertakes to pay for the cost of the return travel to the worker’s country of origin in the event deportation, to ensure suitable accommodation, etc. Finally, the employer has the obligation to notify the authorities that he/she has recruited the worker.

The Immigration Law also provides for the entry of third-country nationals outside the quota scheme. In particular, Article 27 identifies some specific cases in which authorizations, entry visas and residence permits may be granted to given categories of foreign workers, such as university professors, researchers, as well as managers and trained nurses recruited by public and private health hospitals and clinics.

The current debate has increasingly focused on how difficult it is to estimate the demand for foreign labour, mainly due to the current economic situation characterised by a significant loss of jobs.

Determining immigration quotas has become even more complicated in recent years, due to arrivals by sea, which have put pressure on the reception system and generated tension on the labour market.

Many efforts have been made to overcome these difficulties, and in particular, to build a single framework of knowledge, with information about developments in the internal labour market, surveys on estimated recruitment by enterprises and households, and demand for foreign labour according to administrative data.

Section 2: Overview of instruments used for identifying current and future labour and skills shortages and for anticipating the need for labour migration

This section aims to examine the existing instruments and approaches used in (Member) States to identify current and future labour and skills shortages and the anticipated need for migration labour. Firstly, it examines how labour shortages are defined and classified at national level (Q3) as well as whether there are any distinctions made among different types of shortages (Q4). Secondly, this section provides an overview of existing instruments and tools used in (Member) States to identify labour shortages and the need for migration labour to fill shortages in the labour market (Q5). The section explores the role and involvement of social partners and other national stakeholders (Q6). Finally, it aims to collect a summary of the results/findings of the identified instruments.

Q3. Definition and classification of labour shortages

Q3.(a) How are labour shortages defined, identified and classified in your Member State?

Q3.(b) What is the level of analysis (e.g. by sectors, by occupations or by qualifications or skill levels)?

Q3.(c) Are classifications of shortages defined in legislation or soft law (e.g. circulars, regulations, policy documents)? If yes, please describe and provide examples for each of the classifications.
Q3.(d) To which extent the level of analysis includes region/local level?

In Italy, labour shortages are defined, identified and classified either as estimates of unfilled vacancies in industrial and service enterprises, or as a forecast of labour market trends and the occupational and training needs of businesses. In particular, for the aims of this study, labour shortages are defined as forecasts of recruitment, i.e. as forecasts of labour demand in the short and medium term.

Information on vacancies are surveyed, processed and disseminated by the National Institute of Statistics (ISTAT). These data are collected through the quarterly surveys of vacancies and worked hours called ‘Vela’, which have been carried out by ISTAT since the third quarter of 2003. ‘Vela surveys’ collect information from the enterprises referred to in sections B to S of the Ateco classification 2007. The survey concerns the following aspects of labour demand trends: number of occupations at the end of the current quarter and during the previous quarter; occupational inflows and outflows during the quarter; number of vacancies at the end of the current quarter; number of worked hours in the quarter (broken down by regular time, overtime, hours worked but unpaid); hours of temporary redundancy compensation (broken down by ordinary and extraordinary compensation) and unpaid hours due to disputes. All data are collected separately for employees and workers (senior managers/executives are not included in this survey).

Vacancies are defined as the new or existing paid jobs that are unfilled or are about to remain unfilled and for which the employer is actively looking for, and is willing to make additional efforts to find, a suitable candidate outside the enterprise. An active search for a suitable candidate can be carried out in several ways: notifying public employment agencies; contacting private job centres; advertising the vacancy through the media (for example, on the Internet, in newspapers or in magazines) or a public bulletin board; contacting, interviewing or directly selecting candidates; asking employees or other acquaintances for help in the search for a suitable candidate; or using internships for the purpose of selecting prospect employees. The rate of vacancies is defined as the percentage ratio between vacancies and the sum of vacancies and filled positions in the last day of the reference quarter. This indicator measures the number of jobs for which enterprises seek suitable workers and, therefore, it corresponds to the percentage of labour demand that is not met. This indicator has the same rationale as that underlying the unemployment rate, which measures the percentage of labour force seeking employment, thus representing the percentage of the labour supply that is not used. Such characterization describes the vacancies for the existing positions that are not filled on the last day of the reference quarter. By contrast, positions that will become available soon, and for which the search for a suitable candidate has already started, do not fall under the category of unmet labour demand. In fact, this situation will arise only in the future, if the position becomes actually available before the selected candidate is recruited. These data are presented by sector of economic activity, but they are not broken down by region.


These statistics are important from the point of view of economic trends, as proved by the inclusion of the vacancy rate in the list of the Principal European Economic Indicators (PEEIs). These indicators correspond to the statistics on the Euro area and the EU, and are considered essential for European authorities to analyse and work out economic policies.

Another calculation method for labour shortages, i.e. for predicting labour market trends and the occupational and training needs of businesses, is a survey on "Estimated recruitments by enterprises and household demand", carried out, processed and disseminated by the Excelsior Information System.

In 1997, the Italian Union of Chambers of Commerce, Industry, Handicraft and Agriculture, in cooperation with the Ministry of Labour and with the European Union set up the Excelsior Information System for Employment and Training. This system has produced yearly and quarterly forecasts of labour demand and the occupational and training needs of enterprises ever since.

The survey is carried out in each Italian province by the network of Chambers of Commerce, with almost 300,000 direct or telephone interviews a year (approximately 100,000 for the yearly survey and 180,000 for the 4 quarterly surveys), involving enterprises in all economic sectors and of all sizes.

Through the Excelsior Information System, it is possible to estimate the occupational needs in the short and medium
term, including at a local level, for each of the 105 Italian provinces, disaggregated by class size and economic activity.

Excelsior also provides a set of qualitative information about the characteristics of the workers who are most in demand (age, level of education, experience, training needs, etc.). The main tables and the survey database are available at and can be downloaded from http://excelsior.unioncamere.net.

A section of the Excelsior survey is dedicated to the recruitment of migration labour, thus providing forecasts of the demand for immigrant workers. In this case, the system collects data on the minimum and maximum numbers of immigrants that the enterprises are expected to recruit, i.e. the number that the enterprises have already decided to recruit (minimum value) and the number that may be recruited, even though a final decision has not yet been taken in this regard (maximum value).

"Recruitment of immigrants" refers to the recruitment of persons of non-Italian nationality. Excelsior data refer to the forecasts of enterprises that are already active at the beginning of the year and are likely to be still active at the end of the year. Therefore, Excelsior data do not cover employment flows generated by the enterprises that start or end operations during the year.

It should be noted, however, that the Excelsior information system provides forecasts about the labour market and the occupational and training needs of enterprises; so it is essentially a survey.

<table>
<thead>
<tr>
<th>Q4. Do any distinctions between different types of labour shortages exist in your Member States, such as for example:</th>
</tr>
</thead>
<tbody>
<tr>
<td>- <strong>short-term</strong> (current) shortages and <strong>longer-term</strong> (projected) shortages; or</td>
</tr>
<tr>
<td>- <strong>cyclical</strong> shortages (shortages occurring due to short-term imbalances in the supply and demand in the labour market and/or by providing incentives to the labour force) and <strong>structural</strong> shortages (which are due to changes, such as the adoption of new technologies, may increase the demand for certain skills that are not immediately available in the labour market, creating skills shortages even when unemployment is high).</td>
</tr>
</tbody>
</table>

If yes, please describe.

<table>
<thead>
<tr>
<th>Data on both unfilled vacancies and expected recruitments are surveyed on a quarterly basis, therefore they include both seasonal (short-term) and structural, longer-term components. In some sectors (agriculture and tourism-hotels), the seasonal component follows a cyclical trend.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excelsior forecasts of immigrant labour demand, as reported by industrial and service enterprises, are taken into consideration, just like other variables, in setting immigration quotas for work reasons, broken down by non-seasonal work (Article 22) and seasonal work (Article 24).</td>
</tr>
<tr>
<td>We recall that the authorization for seasonal work has a validity of 20 days to 9 months at the most. Such length is the same as that of the seasonal work in question, or of a number of shorter-term jobs to be carried out with different employers, grouped together.</td>
</tr>
<tr>
<td>As regards non-seasonal work, an authorization has a validity of up to 2 years for self-employment, open-ended employment and family reunification. In the case of temporary employment, the validity of the permit is the same as the length of the contract.</td>
</tr>
</tbody>
</table>

---
Q5. Please complete the table below identifying the instruments/tools in your (Member) State used to identify labour shortages and the need for migration labour. You can list more than one instrument/tool per category.

<table>
<thead>
<tr>
<th>Instruments and tools used for identifying labour market shortages and the need for migration labour</th>
<th>Is this instrument/tool used in your (Member) State? (Y/N)</th>
<th>Is this instrument used for determining labour migration needs? (Y/N)</th>
<th>Please briefly describe the respective tool(s) and the methodology(ies) used for anticipating the need for migration labour.</th>
<th>(1) Please describe the level of analysis of the particular instrument/tools (i.e. skills, occupations, sectors, professions, level of qualifications, others).</th>
<th>Which national organisation(s) use this mechanism/tool to produce information on skill shortages?</th>
<th>What is the geographical level of the mechanisms/tools used (e.g. national, regional, municipal)?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Lists of shortage occupations</strong></td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td><strong>Sector analysis</strong></td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td><strong>Employer Surveys</strong>&lt;br&gt;The quarterly survey of vacancies and hours worked (VELA)</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>The VELA survey measures vacancies, occupational stocks and flows, worked hours and paid hours in enterprises with 10-499</td>
<td>This survey is organized in accordance with Regulation (EC) No 453/2008 of the European Parliament and of the Council of 23 April 2008 on quarterly statistics on Community job vacancies. This survey is conducted by the Italian National Institute of Statistics and the results are made public in a quarterly publication,</td>
<td>The survey units are enterprises with at least 10 employees operating in the industrial or in some service sectors drawn from the Statistical...</td>
</tr>
<tr>
<td>Forecasts/foresight analysis</td>
<td>Y</td>
<td>This system reconstructs the forecasts of labour demand and of occupational and training needs, as expressed by enterprises, on a yearly and quarterly basis. Therefore, it is intended to estimate the total labour demand of enterprises (i.e., both native and foreign workers). It contains,</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>----------------------------</td>
<td>---</td>
<td>This report surveys a sample of about one hundred thousand Italian enterprises, and it is updated on a yearly basis. The field of observation of the Excelsior survey is the universe of private enterprises registered with the Chambers of Commerce. The questionnaire submitted to the enterprises by telephone or by direct interview is divided into six sections. A set of questions concerns the employers' intention of</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>1) The data collected through the Excelsior survey provide qualitative trends, such as a need for further training of newly recruited persons; a demand for specific experience and/or qualifications; and the professional profiles, sectors and skills that are mostly in demand. 2) The sectors of economic activity in the Excelsior information system are</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>This tool is used by the Ministry of Labour and by the Italian Union of Chambers of Commerce, Industry, Handicraft and Agriculture - Unioncamere. The latest 3-year policy papers on immigration and foreign nationals (Article 3(1) of the Immigration Law) based the determination of immigration quotas on the forecasts of the demand for migration labour worked out in the Excelsior survey.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>The surveyed and analysed units are the enterprise and the local provincial unit. (The latter is, in fact, a conventional variable defined as the set of local units of the same enterprise operating in a province; its employees correspond to the sum of the employees operating in the province.) Therefore, it is possible to estimate occupational needs in the short and medium term, including at a local</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Register of Active Enterprises (ASIA). The geographical level consists of 3 regions: northern, central and southern Italy.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Data are broken down by sector of economic activity (Ateco 2007) and by geographical distribution (northern, central and southern Italy and Islands).</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>This is available from the site: <a href="http://www.istat.it/it/archivio/138419">http://www.istat.it/it/archivio/138419</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Data are broken down by sector of economic activity (Ateco 2007) and by geographical distribution (northern, central and southern Italy and Islands).</td>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td></td>
<td>which is available from the site: <a href="http://www.istat.it/it/archivio/138419">http://www.istat.it/it/archivio/138419</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
however, a section especially dedicated to foreign labour. Moreover, publications include a yearly and quarterly report exclusively devoted to foreign labour in Italy.

recruiting migration labour. As specified above, the Excelsior survey on the recruitment of migration labour collects data on the minimum and maximum numbers of immigrants that the enterprises are expected to recruit, i.e. the number that the enterprises have already decided to recruit (minimum value) and the number that may be recruited, even though a final decision has not yet been taken in this regard (maximum value).

grouped into 28 clusters, specifically defined based on a theoretical sampling plan. These clusters include divisions (2-digit codes) and groups (3-digit codes), as specified in the official classification of economic activities, ATECO 2007. ATECO 2007 is the domestic version of the European nomenclature, Nace Rev.2, published in the Official Journal on 20 December 2006 (Regulation (EC) No1893/2006 of the European Parliament and of the Council of 20/12/2006). Job levels refer to the following categories: senior managers, middle managers and employees, manual workers and other staff. Elementary occupations are classified according to the ISTAT 2001 classification, ensuring consistency with the European classification (ISTAT 2011 is linked to ISCO level, for each of the 105 Italian provinces - including Monza-Brianza and Fermo - disaggregated by class size and economic activity.
<p>| | | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Qualitative studies or analysis</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>Other instruments/tools (please describe)</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
</tbody>
</table>
Q6. Concerning lists of shortage occupations, please briefly describe:

a. The process for developing the shortage occupation lists;

b. What are the criteria for selecting the shortage occupations (e.g. advertised vacancies are significantly higher than the qualified national job seekers available)?

c. Which organisations/institutions play a role in determining lists of shortage occupations?

d. How frequently are the lists of shortage occupations updated?

N

Q7. For each of the instruments and tools used for identifying labour market shortages in Q5, please outline how it is used for policy purposes? Is there a formalised mechanism to disseminate the information produced? (Y/N) If yes, please describe.

The information contained in the National Information System on the occupational needs of Italian enterprises (Excelsior) is disseminated in two ways. On the one hand, there are traditional publications on paper, which are issued on a quarterly and yearly basis (called bulletins and reports, respectively). On the other hand, the data contained in both the bulletins and the reports are published on-line in an electronic format; they are freely available at and downloadable from http://excelsior.unioncamere.net. They are also available as data bases, which make it possible to draw up personalized tables, at http://excelsior.unioncamere.net/xt/flash.geoChooser/scegli-archivio.php

The results of the quarterly survey of vacancies and worked hours (Vela) are disseminated in the same ways. In particular, ISTAT makes preliminary estimates of vacancies in industrial and service enterprises, which are available on-line at http://dati.istat.it/, under the topic “Lavoro”.

Q8. Are any of the tools/mechanisms for identifying labour market shortages identified above (e.g. lists of shortage occupations, employers’ needs analysis, surveys, forecasts, etc.) used to determine any of the policy instruments for managing economic migration (e.g. quotas, labour market tests, points-based systems, etc.)? (Yes/No) If yes, please describe.

The 3-year Policy Document on immigration and foreign nationals (Article 3(1) of the Immigration Law) serves as a basis for immigration policy. One of the main objectives of this document is to set immigration quotas. Determining the needs for foreign labour plays a key role in this respect. The main indicator used to determine this need is the expected recruitment of foreigners by enterprises, and labour demand by households. In this case, data come from the forecasts produced by the Excelsior information system. For a more accurate picture of the procedures and indicators used for determining foreign labour needs, and the relation with estimated labour shortages, see the following table.

<table>
<thead>
<tr>
<th>Synoptic table for determining immigration quotas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Variables taken into consideration in calculating immigration quotas</td>
</tr>
<tr>
<td>----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Elements for estimating demand for foreign workers</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>
### Determining labour shortages and the need for labour migration from third countries

<table>
<thead>
<tr>
<th>Forms of entry other than quotas connected to the demand for foreign workers</th>
<th>Annual average of issued residence permits</th>
<th>Average decrease in population aged 15-64 (a. v.)</th>
<th>Average increase in estimated total employment</th>
<th>Family Reunification</th>
<th>Beneficiaries of international protection, etc. (who have the right to work)</th>
<th>Entry of workers outside quotas (Article 27 of the Immigration Law)</th>
</tr>
</thead>
</table>


---

Q9. Do any mechanisms or tools to monitor intra-EU mobility of workers filling job vacancies in the national labour market or leaving to work in other Member States exist in your Member State? (Y/N) If yes, please describe.

*If possible, please distinguish between mechanisms or tools to monitor intra-EU mobility with regard to (i) shortage occupations and (ii) other occupations not considered as shortage occupations.*

*Please indicate the national sources of statistics or data on EU citizens working in your Member State.*

---

In Italy, there are several tools to monitor the labour market, including the mobility of workers from and to Italy, which, however, has no direct relationship with occupational shortages. The Ministry of Labour has dedicated a website to these topics. In particular, there is a section called Labour Barometer: [http://www.cliclavoro.gov.it/Barometro-Del-Lavoro/Pagine/default.aspx](http://www.cliclavoro.gov.it/Barometro-Del-Lavoro/Pagine/default.aspx)

The Labour Barometer collects surveys and statistical data on the trend in occupations and labour market forecasts, as compiled by the Ministry of Labour and Social Policies and by agencies, national institutes and research observatories. The documents available for consultation include the following: publications on topics of (legal) employment and self-employment taken from the Statistical Information System of Mandatory Notifications; Annual Reports on Social Cohesion; ISTAT publications on ISTAT sample data from the On-going Survey on Labour Force, CNEL Reports on the labour market, and Unioncamere publications on data from the Excelsior Information System, offering a wide cross section overview on labour supply. The labour barometer is divided into the following sections:

- **Labour market trends:** This section contains reports edited by the Ministry of Labour and Social Policies, in particular an Annual Report on Mandatory Notifications, with quarterly notes, flash and regular publications on specific topics (such as a Quarterly Report on Dismissals), an Annual Report on Social Cohesion; and an Annual Report on the Immigrant Labour Market.

- **Labour services:** This section contains weekly monitoring reports on the Youth Guarantee and Surveys on Occupational Services.

- **ISTAT Reports:** This section contains all yearly and periodical reports related to labour market analyses and related issues.

- **Excelsior Reports:** This section contains yearly and quarterly Unioncamere reports and other publications relating to special topics (occupational and training needs of enterprises, occupational opportunities for holders of a diploma in Italian enterprises, etc.....)

- **Other national reports:** This section contains the materials produced by agencies, national institutes and research observatories (INPS, INAIL, CNEL, Italia Lavoro, Bank of Italy, Svimez, Confindustria) and links to relevant databases.

- **International Relations:** This section contains the publications of major international institutions (European
Q10. Please outline the **role of social partners** (see definition of social partners above) and **other stakeholders** (please identify which stakeholders) in identifying the need for migrant labour? Is there a formalised mechanism to consult/involve social partners in identifying the anticipated need for migrant labour or is their involvement on an ad-hoc basis?

Italian legislation attaches an important role to social partners during both the preparation and the implementation of immigration policies. Social partners are represented in the national bodies that are responsible for the integration of immigrants and in local committees, under the Decree of the President of the Council of Minister of 18 December 1999 and Article 57 of the Decree of the President of the Republic 31 August 1999 No 394. In particular, this measure established Territorial Councils for Immigration in all Italian Prefectures. The Territorial Councils for Immigration are chaired by Prefects and are made up of representatives from local Government, Regions, local authorities, Chamber of Commerce, bodies providing assistance to immigrants, workers' unions, employer's associations and non-EU workers' associations. The Territorial Councils for Immigration promote initiatives, make proposals in cooperation with other institutions and monitor implementation.

Finally, social partners participate in determining immigration quotas, as established in Article 3(1) of the Immigration Law.

Q11. Q5 in Section 2 examined the types of national instruments used in your Member State to identify labour shortages and the need for migrant workers. Please briefly summarise the results/findings of these instruments for the most recent year(s)

Relevant publications are available on line at:


Database for making ad hoc charts are available at:

http://excelsior.unioncamere.net/xt/flash.geoChooser/scegli-archivio.php

Here below are two examples of tables.
Table 1 - Maximum number of immigrant workers expected to be recruited over the years 2010 - 2013

<table>
<thead>
<tr>
<th>Industry</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food, beverages and tobacco industries</td>
<td>2,890.</td>
<td>2,080.</td>
<td>1,030.</td>
<td>970.</td>
</tr>
<tr>
<td>Textile</td>
<td>2,410.</td>
<td>3,060.</td>
<td>1,200.</td>
<td>1,170.</td>
</tr>
<tr>
<td>Furniture and wood industries</td>
<td>1,370.</td>
<td>1,340.</td>
<td>560.</td>
<td>450.</td>
</tr>
<tr>
<td>Mining and ore processing industries</td>
<td>770.</td>
<td>770.</td>
<td>300.</td>
<td>390.</td>
</tr>
<tr>
<td>Metal and electronic industries</td>
<td>7,860.</td>
<td>9,440.</td>
<td>4,760.</td>
<td>3,960.</td>
</tr>
<tr>
<td>Chemical and pharmaceutical industries</td>
<td>2,110.</td>
<td>1,660.</td>
<td>740.</td>
<td>630.</td>
</tr>
<tr>
<td>Other industries</td>
<td>1,360.</td>
<td>1,200.</td>
<td>1,160.</td>
<td>940.</td>
</tr>
<tr>
<td>Building</td>
<td>17,560.</td>
<td>15,130.</td>
<td>8,280.</td>
<td>5,340.</td>
</tr>
<tr>
<td>Trade</td>
<td>10,900.</td>
<td>6,300.</td>
<td>5,580.</td>
<td>3,720.</td>
</tr>
<tr>
<td>Tourist services, accommodation and food &amp; beverage</td>
<td>15,610.</td>
<td>9,250.</td>
<td>12,110.</td>
<td>7,810.</td>
</tr>
<tr>
<td>Computer services and telecommunications</td>
<td>790.</td>
<td>730.</td>
<td>730.</td>
<td>440.</td>
</tr>
<tr>
<td>Advanced support services for enterprises</td>
<td>1,300.</td>
<td>1,020.</td>
<td>2,550.</td>
<td>1,180.</td>
</tr>
<tr>
<td>Operational support services for persons and enterprises</td>
<td>15,720.</td>
<td>12,180.</td>
<td>8,410.</td>
<td>5,300.</td>
</tr>
<tr>
<td>Transport services, logistics and storage</td>
<td>7,130.</td>
<td>6,630.</td>
<td>3,430.</td>
<td>3,360.</td>
</tr>
<tr>
<td>Financial and insurance services</td>
<td>500.</td>
<td>310.</td>
<td>260.</td>
<td>70.</td>
</tr>
<tr>
<td>Other business services</td>
<td>150.</td>
<td>230.</td>
<td>200.</td>
<td>70.</td>
</tr>
<tr>
<td>Personal services</td>
<td>15,890.</td>
<td>10,390.</td>
<td>7,720.</td>
<td>6,660.</td>
</tr>
<tr>
<td>Consulting firms</td>
<td>970.</td>
<td>770.</td>
<td>1,350.</td>
<td>300.</td>
</tr>
<tr>
<td>Total *</td>
<td>105,820</td>
<td>82,990.</td>
<td>60,570.</td>
<td>42,960.</td>
</tr>
</tbody>
</table>

* Absolute values rounded off to the nearest tenths. Due to rounding off, the totals may not coincide with the sum of the individual values.


This table shows the number of immigrant workers expected to be recruited by enterprises in the period 2010-2013. Data suggest an emerging drop in recruitment due to the economic crisis, which resulted in a decline in total employment and a rise in unemployment. Therefore, recruitment forecasts for these years suggested a general downward trend.
Table 2 shows the recruitment forecasts of migrant labour for 2014.

Table 2 - Forecasts of immigrant labour to be recruited by enterprises in 2014 by sector of activity, geographical distribution and size class

<table>
<thead>
<tr>
<th>Sector of Activity</th>
<th>Recruitment forecasts (number of people)</th>
<th>out of a maximum value (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Minimum (Absolute values) *</td>
<td>% of the total Recruitment (number of people)</td>
</tr>
<tr>
<td>TOTAL</td>
<td>57,870</td>
<td>9.4</td>
</tr>
<tr>
<td>INDUSTRY</td>
<td>14,300</td>
<td>8.7</td>
</tr>
<tr>
<td>Industry (in the strict sense of the term)</td>
<td>8,850</td>
<td>8.5</td>
</tr>
<tr>
<td>Mining</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Food</td>
<td>2,310</td>
<td>8.7</td>
</tr>
<tr>
<td>Textile</td>
<td>1,590</td>
<td>11.6</td>
</tr>
<tr>
<td>Furniture and wood</td>
<td>400</td>
<td>8.4</td>
</tr>
<tr>
<td>Paper</td>
<td>250</td>
<td>9.9</td>
</tr>
<tr>
<td>Chemical</td>
<td>250</td>
<td>5.7</td>
</tr>
<tr>
<td>Rubber</td>
<td>430</td>
<td>10.7</td>
</tr>
<tr>
<td>Ore processing</td>
<td>130</td>
<td>5.1</td>
</tr>
<tr>
<td>Metallurgical</td>
<td>1,660</td>
<td>10.6</td>
</tr>
<tr>
<td>Machinery and equipment manufacturing</td>
<td>1,190</td>
<td>6.1</td>
</tr>
<tr>
<td>Electrical and electronic</td>
<td>450</td>
<td>5.9</td>
</tr>
<tr>
<td>Household goods and recreation activities</td>
<td>160</td>
<td>8.8</td>
</tr>
<tr>
<td>Public utilities (electricity, gas, water, environment)</td>
<td>420</td>
<td>4.4</td>
</tr>
<tr>
<td>Building</td>
<td>5,030</td>
<td>10.1</td>
</tr>
<tr>
<td>SERVICES</td>
<td>43,580</td>
<td>9.7</td>
</tr>
<tr>
<td>Trade and repair of cars and motorbikes</td>
<td>530</td>
<td>7.5</td>
</tr>
<tr>
<td>------------------------------------------------------</td>
<td>---------------</td>
<td>----------</td>
</tr>
<tr>
<td>Wholesale trade</td>
<td>1,900</td>
<td>9.7</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>3,230</td>
<td>5.1</td>
</tr>
<tr>
<td>Accommodation and food services; tourist services</td>
<td>24,13 0</td>
<td>15.6</td>
</tr>
<tr>
<td>Transport, logistics and storage services</td>
<td>2,740</td>
<td>8.1</td>
</tr>
<tr>
<td>Media and communication services</td>
<td>140</td>
<td>3.8</td>
</tr>
<tr>
<td>Computer services and telecommunications</td>
<td>370</td>
<td>2.5</td>
</tr>
<tr>
<td>Advanced support services for enterprises</td>
<td>780</td>
<td>3.7</td>
</tr>
<tr>
<td>Financial and insurance services</td>
<td>80</td>
<td>0.8</td>
</tr>
<tr>
<td>Operational support services for persons and enterprises</td>
<td>4,440</td>
<td>10.2</td>
</tr>
<tr>
<td>Education and private education services</td>
<td>580</td>
<td>6.0</td>
</tr>
<tr>
<td>Health, social care and private health services</td>
<td>2,690</td>
<td>8.4</td>
</tr>
<tr>
<td>Personal services</td>
<td>1,740</td>
<td>5.8</td>
</tr>
<tr>
<td>Consulting firms</td>
<td>230</td>
<td>3.1</td>
</tr>
</tbody>
</table>


According to the Excelsior Information System report, "in 2014 the recruitment of seasonal immigrant labour in enterprises will reach a maximum value of 40,700 units, with a reduction of more than 5% (equal to 2,200 persons) compared to 2013. These figures represent less than 11% of total non-seasonal entries, down compared to 2013. This is the lowest percentage since 2003, much lower than the figures recorded until 2007, which were usually close to 30% (even 33.4% in 2003) p. 12 ".


Q12. (a) Please indicate any challenges and risks associated with the use of instruments for identifying labour shortages and the need for migration labour in your (Member) State. (based on existing studies/evaluations or information received from competent authorities)

Q12. (b) Are there shortage occupations which are not addressed through labour migration (for example because of political concern, sensitivity of the jobs, etc.). If so, how is this determined?

The estimated demand for foreign labour based on the analyses of labour market trends made by Excelsior-Unioncamere has severe limitations due to very nature of this information system. Since data are essentially based on employers’ recruitment forecasts, and not on actual recruitment, this system is more useful to obtain trends and disaggregated information by sector, than actual figures. Therefore, these estimates do not actually account for vacant jobs, (jobs that are not filled by local or non-local workers residing in Italy), and, for this reason, they are not accurate. Moreover, these estimates are extremely sensitive to economic performance and are highly depend on the employers' perceptions of market trends. Therefore, actual labour needs may be either overestimated or underestimated.

In addition, these recruitment estimates do not necessarily refer to foreign workers living abroad; the migration labour to be recruited may already be in Italy under different statuses. For this reason, the estimates of immigration quotas for work reasons also take into account migrants who enter Italy for other reasons, such as for family reunification.

Finally, this system does not take into consideration the marked sectoral and geographical characterization of the Italian labour market. Therefore, on the one hand, there is a tendency to underestimate the demand for seasonal labour and to overestimate the demand for non-seasonal labour, and on the other hand, the demand for foreign labour is overestimated in the South and underestimated in the North.

Section 3: Monitoring the outcomes of labour migration policy in relation to shortage occupations

This section examines the tools and mechanisms to monitor the outcomes of labour migration policy in relation to shortage occupations (e.g. workforce analysis, analysis of types of work permits granted, sector analysis, discussions with employers, etc.). It begins with a series of questions on the instruments used. The section also explores the use of these instruments; the role of social partners and other stakeholders and any challenges and risks associated with their use.

Q13. Are the outcomes of labour migration policies in relation to shortage occupations monitored in your (Member) State? If yes, please describe:

(a) What are the monitoring mechanisms (e.g. workforce analysis, analysis of types and number of work permits granted, sectoral analysis, discussions with employers, etc.)? Is there a formal mechanism(s) to monitor the effects of migration on the labour market in your (Member) State or is this done on an ad-hoc basis?

(b) At what level are labour migration policy outcomes monitored (e.g. workforce, sectors, skill levels, occupations)?

(c) Which organisations carry out such monitoring? For example, are these produced by national agencies; academics; NGOs?

(d) Is the monitoring laid out in legislation or soft law (e.g. circulars, policy documents)?

Under Article 3(1) of the Immigration Law, the Government has to report to Parliament about the results achieved with the implementation of the Policy Document by submitting an annual report prepared by the Ministry of the interior.

Also, from 2001 to 2008, the Court of Auditors (Central management control division) carried out a series of surveys on the 'Management of expected migration labour. Immigration regulation and support. Control of illegal
immigration’. Four reports were adopted (related to 2002, 2003, 2004, and 2005-2006). The last report, approved in 2008, showed the results of these surveys for the years 2005 and 2006. These surveys analysed immigration policies in terms of the following: management of results, efficiency and effectiveness of the measures, procedural regularity and consistency of the organizational strategy against the objectives set out in legislation.

In addition, Article 2-bis of the Immigration Law established a Coordination and Monitoring Committee. This Committee monitors the implementation of the law and is composed of the ministers with relevant responsibilities and a President of a Region or an Autonomous Province, designated by the Conference of Presidents of the Regions and Autonomous Provinces. Moreover, a technical group was set up at the Ministry of the Interior for investigating the matters that fall under the competence of the Coordination and Monitoring Committee.

Moreover, the effects of the quota policy are monitored under Article 21(4bis). Article 21(4bis) establishes that the yearly quota decree should be prepared on the basis of data on actual labour demand, broken down by Regions and provincial areas, as processed by the electronic information register (set up at the Ministry of Labour and Social Policies, as specified in Article 21(7)). In addition, the implementing regulation provides for possible forms of cooperation with other public and private entities. Under Article 21(7), the implementing regulation has to lay down the establishment of an annual electronic register of foreign labour supply and demand and set out how to link this register with that of the National Social Security Institute (INPS) and with the Questure (provincial police headquarters). The purview of these two rules in the past policy documents led to the fully automation of the procedures to apply for and obtain entry permits for work reasons at the Single Desk for Immigration.

Automation was completed in 2010 (with reference to the immigration quotas). Automated and centralized information at the Single Desk for Immigration on entries for work reasons and employment relationships enables regular monitoring. This monitoring activity concerns the outcome of the quota system (i.e. the number of entry applications against the number of granted permits) as well as application procedures. The goal is to maximize time and spot abuses, however these results also serve as a basis for setting future immigration quotas.

Q14. For each of the instruments and tools used for monitoring the outcomes of labour migration policy in relation to shortage occupations in Q13a, please outline how it is used? Are there formalised mechanisms to disseminate the results of each monitoring mechanism listed in Q13(a)? (Y/N) If yes, please describe

N

Q15. Please outline the role of social partners (including organised representatives of employers and employees) and other stakeholders in monitoring the effects of labour migration on the labour market? Is there a formalised mechanism to consult/involve social partners or is their involvement on an ad-hoc basis?

Each year the Ministry of Labour promotes a report on immigrants in the Italian labour market, drawn up by the Directorate General of Immigration and Integration Policies, in collaboration with the DG for the Labour Service Policies, INPS, INAIL, Unioncamere, Ptolemy Studies and Research, and Italia Lavoro. This report is based on data from different institutional, statistical and administrative sources and is a tool for identifying the effects of foreign labour on the Italian labour market.

In addition, representatives of entities, national associations and workers' and employers' associations referred to in Article 3(1) of the Immigration Law may be invited to the meetings of the Technical Group that support the Coordination and Monitoring Committees (Article 2 bis).

Finally, Article 21(4-b) provides that, when determining the need for foreign labour for the purposes of setting
immigration quotas, by 30 November of each year, the Regions may send a report to the Presidency of the Council of Minister on the presence and condition of third-country immigrants in their regional territory. This report may also include estimates on sustainable levels of immigrants in relation with the 'absorption capacity' of the local labour market and the social fabric.

Over the years, the Regions have developed their own procedures for proposing immigration quotas, monitoring the effects of previous quotas on the local labour market. In these procedures, the social partners play both a consultative and a proactive role. The level of formalization of this role depends on the Region.

Q16. Please indicate any challenges associated with monitoring the outcomes of labour migration policy in relation to shortage occupations in your (Member) State or the impact of labour migration on the labour market at large (based on existing studies/evaluations or information received from competent authorities)
Statistical Annex

**A1. Workers employed by selected occupations and estimated unfilled vacancies (statistics for the latest available year)**

Member States are requested to also provide statistics on a number of pre-selected occupations. The occupations in the table below are selected on the basis of the occupations that most frequently feature in (Member) States’ shortage lists identified in the recent EMN Inform "Approaches and tools used by Member States to identify labour market needs”. This section of the Statistical Annex is also aimed at collecting statistics on intra-EU mobility in terms of filling in shortage occupations.

If statistics are available based on ISCO-08, please provide the statistic based on the ISCO-08 number in brackets.

If statistics are not available based on ISCO-08, please provide the national equivalent available.

If your Member State has not yet adopted ISCO-08, but can provide ISCO-88 statistics, please provide the ISCO-88 statistics where statistics is available for the categories and sub-categories below.

**Table 1: Workers employed by specific occupations and estimated unfilled vacancies (last available year)**

<table>
<thead>
<tr>
<th>Specific occupations</th>
<th>Total employment</th>
<th>Employment of EU-nationals from other Member States</th>
<th>Employment of third-country nationals</th>
<th>Number of residence permits for specific third-country nationals</th>
<th>Number of unfilled vacancies</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Male</td>
<td>Female</td>
<td>Total</td>
<td>Male</td>
<td>Female</td>
<td>Total</td>
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<tr>
<td><strong>Health Professional (22)</strong></td>
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<td>Of which: Medical doctors (221)</td>
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<td>Of which: Nursing and Midwifery Professionals (222)</td>
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<td><strong>Personal care workers (53)</strong></td>
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<td>Of which: Child Care Workers (5311)</td>
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<td>Of which: Health Care Assistants (5321)</td>
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<td>Of which: Home-based Personal Care Workers (5322)</td>
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<td><strong>Personal Services Workers (51)</strong></td>
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<td>Of which: Cooks (5120)</td>
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<td>Of which: Waiters (5131)</td>
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<td>Category</td>
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<tr>
<td>Cleaning and Housekeeping services in offices, hotels and other</td>
<td>(5151)</td>
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<tr>
<td>establishments</td>
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<td>Domestic Housekeepers</td>
<td>(5152)</td>
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<td>Skilled Agricultural, Forestry and Fishery Workers</td>
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<td>Field Crop and Vegetable Growers</td>
<td>(6111)</td>
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<td>Gardeners; Horticultural and Nursery Growers</td>
<td>(6113)</td>
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<td>Livestock and Dairy Producers</td>
<td>(6121)</td>
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<tr>
<td>Information and Communications Technology Professionals</td>
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<tr>
<td>Software and Applications Developers and Analysts</td>
<td>(251)</td>
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<tr>
<td>Database and Network Professionals</td>
<td>(252)</td>
<td></td>
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<tr>
<td>Teaching professionals</td>
<td>(23)</td>
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<tr>
<td>Engineering Professionals (excluding Electro-technology)</td>
<td>(214)</td>
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<tr>
<td>Architects, Planners, Surveyors and Designers</td>
<td>(216)</td>
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<tr>
<td>Accountants</td>
<td>(2411)</td>
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</tbody>
</table>
### A2. Top 15 professions included in lists of shortage occupations (statistics for the latest available year)

This part of the Statistical Annex aims to collect data on the occupations included in lists of shortage occupations and any estimations of unfilled vacancies.

If there are several regional lists of shortage occupations instead of a national list, please fill in the table below providing data for each region. You can create new tables below per region. Alternatively, you can use the box provided below to provide a descriptive overview and any available data.

If statistics is available based on ISCO-08, please provide the statistic based on the ISCO-08 number in brackets.

If statistics are not available based on ISCO-08, please provide the national equivalent available.

#### Table 2: Statistics on lists of shortage occupations

<table>
<thead>
<tr>
<th>ISCO-08 (4 digit level)</th>
<th>Equivalent national classification of occupations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Occupation included in the list of shortage occupations</td>
<td>Is there a specified number of vacancies to be filled with labour migrants from third-countries? (Y/N) If yes, please provide the number</td>
</tr>
<tr>
<td>Are there any special conditions for migrants from third-countries applying for shortage occupations? (Y/N)</td>
<td>Source and additional information</td>
</tr>
<tr>
<td>Occupation included in the list of shortage occupations</td>
<td>Is there a specified number of vacancies to be filled with labour migrants from third-countries? (Y/N) If yes, please provide the number</td>
</tr>
<tr>
<td>Are there any conditions that migrants from third-countries need to fulfil when applying for shortage occupations? (Y/N)</td>
<td>Source and additional information</td>
</tr>
<tr>
<td>Please describe conditions which are targeted to TCNs as well as other conditions that may affect TCNs’ employment (for example, some professions may be regulated and may concern only MS nationals)</td>
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</table>
Determining labour shortages and the need for labour migration from third countries

<p>| | | | | | | | | | | | |</p>
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Please provide any additional statistics or information regarding the national/regional lists of shortage occupations *(Maximum 1 page)*